IOWA IMPACS

Iowa Management of Procurement and Contracts System

Request for Proposal (RFP) Step-by-Step Guide - DHHS



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When the price is not the sole consideration for awarding a procurement contract, the Agency uses a Request for Proposal process. In this process, the award goes to the respondent whose proposal is determined to be most advantageous to the state in accordance with technical and price criteria outlined in the RFP.

See the DAS Central Procurement Policy and Procedures Manual for more details.

The RFP may require additional approvals from OCIO or IDOM in accordance with its policies.

The competitive sealed RFP process includes the following steps:

Creating the Request for Proposal (RFP)
 Posting the RFP on IMPACS and Bid Opportunities (Note: Bid Opportunities will be discontinued in February 2024)
 Receiving and Opening the Proposals
 Evaluating and Scoring the Proposals
 Awarding the Contract
 Negotiating the Contract
 Generating the Contract

TSB Notification IAC 117.7(2)

Post all solicitations to the TSB web page at least 48 hours before the opening date and time in IMPACS. The TSB posting can be achieved in IMPACS by populating the "Release Date" field on the Setting page with a date at least 48 hours before the opening date and time. (February 2024)





Sign into Okta and locate the Jaggaer stickers



Best practice: Create an RFP in the IMPACS (Jaggaer) TEST UIT environment before posting in the Production (PROD) live site.







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Left Menu Icons

Create Solicitation



Open the **Sourcing Menu**. Select the **Solicitations** Sub-menu and **Create New Event**.

Image: Contracts My Events Image: Accounts Total Solicitations: 25 Event Number Image: Event Image: Even	-	Shop	Dashboards · Solicita	tions Das	shboard - LS	3	
★ Contracts ★ Accounts Payable ★ Vendors 005-RFB-0159-2022 005-RFB-0159-	 	Orders	Accounts Payable Dashboard	Admin Da	ashboard Ad	min Dashboard - L	S Contract Ma
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est 008			Sourcing Administration				6
							EST007
							est 008
							17009
005-RFB-0254-2023 Under Evaluation RFB Test010			005-RFB-0254-2023	Under Eve	aluation	RF	B Test010

Create New Event





- 1. Enter the **Title** of the RFP.
- Type in HHS (Agency) or search for your department by clicking the Search icon (magnifying glass).

Create Solicit	ation	×
About the Solicitation	(Step 1 of 2)	?
Department *	Department Name	
* Required		Next >

Create the Solicitation



(Optional) After clicking Search, you will see this pop-up screen

Select the arrow next to the appropriate Department tree.

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Departments	×
۹	
C Elected Officials	
► ○ INACTIVE	
 O Schools 	
State of Iowa Cabinet Agencies	
 State of Iowa Non-Cabinet Agencies 	
Selected Value	
No Value Selected	
Save Cha	Inges Close
ini i	

(Optional) Select the Department

There are three sections of the department tree:

- 1. Elected Officials
- 2. State of Iowa Cabinet Agencies.
- 3. State of Iowa Non-Cabinet Agencies.

Select the arrow next to the appropriate department tree, and drill down until you find the correct department. Click the radio button next to the department, then **Save Changes**.

In the adjacent illustration for Elected Officials, IDALS has several sub-departments under the main department.

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Departments	Departments *	Departments *
Q • Elected Officials • Agriculture and Land Stewardship - IDALS • Agriculture - Cattle Promotion • Agriculture - Corn Promotion • Agriculture - Development Authority • Agriculture - Soylean Promotion • Agriculture - Soybean Promotion • Agriculture - Soybean Promotion • Agriculture - Turkey Marketing Council • Loess Hills Development & Conservation Authority • Attorney General - Department of Justice • Auditor of State • Governor's Office • Judicial Branch • Legislative Branch • Secretary of State - SOS • Treasurer of State - TOS • INACTIVE • Schools • State of Iowa Cabinet Agencies • State of Iowa Non-Cabinet Agencies	Q • Elected Officials • INACTIVE • Schools • State of Iowa Cabinet Agencies • Administrative Services - DAS • Corrections - DOC • Economic Development Authority - IEDA • Education -DE • Health and Human Services - DHHS • Homeland Security & Emergency Management - HSEMD • Inspection, Appeals & Licensing - DIAL • Insurance & Financial Services - DIFS • Iowa Workforce Development - IWD • Management - DOM • Natural Resources - DNR • Public Defense - DPD • Public Safety - DPS • Revenue - IDR • Transportation - DOT • Veterans • State of Iowa Non-Cabinet Agencies	Q • Elected Officials • INACTIVE • Schools • State of Iowa Cabinet Agencies • State of Iowa Non-Cabinet Agencies • Board of Parole • Board of Regents • Campaign Finance Disclosure Commission • Department for the Blind • Executive Council • Iowa Communications Network - ICN • Iowa Law Enforcement Academy • Iowa Utilities Division - IUB • Office of Energy Independence • Public Employment Relations Board • Public Information Board • Rebuild Iowa Office • State Fair Foundation
Selected Value	Selected Value	Selected Value
No Value Selected	No Value Selected	No Value Selected
Save Changes Close	Save Changes Close	Save Changes Close

(Optional) Select the Department

Click the **Search** icon (magnifying glass) to select the type of solicitation being created. Select the DHHS Event Type that applies.

Select DHHS - Request for Proposal.

The **Template** will automatically populate.

Click on Create Solicitation.

About the Solicitation	(Step 2 of 2)	?
Event Type * 😧	Event Type	
Create from Template	Template Name Q	
Required	<pre></pre>	Create Solicitatio
Required	C Previous	Create Solicitation
Required Create Solici		Create Solicitation
	tation	Create Solicitation
Create Solici	tation	Create Solicitation

About the Solicitation







Following the wizard on the lefthand side of the screen, IMPACS will walk the Issuing Officer (Buyer) through setting up the RFP.

prime prime wet Status: best etings and Content v best Type • O best Status: best Type • O eters opartment eters opartment eters opartment eters opartment eters opartment eters opartment eters opartments eters opartment otar eters opartment opartment opartment opartment opartment opartment opartment o	FP Test		Setup		Event Actions 🔻 His	story	2
ettings and Content ** Department ettings and Content ** Department Health & Human Services - DHHS escription uyer Attachments Proved Vendor Invitation by Ves Commodity Code Forced Vendor Invitation by Ves Commodity Code Public Event Short Display and Communication Visible to Public Ves Public Event Short Description Cod characters remaining Restrict Bayer Notifications Ves Control Ves Public Event Short Description Control Control Standard Time (US/Cent * Open Date * Cobs Date * Cobs Date * Cost Control Standard Time (US/Cent * Cost Control Standard Time (US/Cent * Cost Date * Cost Control Standard Time (US/Cent * Cost Date * Cost Control Standard Time (US/Cent * Cost Date * Cost Control Standard Time (US/Cent * Cost Control Standar	ype:	DHHS - Request for Proposal	Event Title *	RFP Test 003			
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sers cons cons cons 	ettings and	Content 🗠	Department	Health & Human Services - DHHS			
escription uyer Attachments endors endors eview and Submit	etup		Event Number *	401-RFP-HHS-0012-2024 📝			
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Forced Vendor Invitation by Yes Commodity Code	endors	0		- Edit			
ools > > Display and Communication Visible to Public Ves Public Event Short Description 200 characters remaining Restrict Buyer Notifications Ves Ves Ves Open Date * Close Date * Public Event Short Open Date * Close Date *	eview and S	ubmit 🔺	Forced Vendor Invitation by	Yes			
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✓ Dates Time Zone CDT/CST - Central Standard Time (US/Cent ▼ Open Date *				200 characters remaining			
Time Zone CDT/CST - Central Standard Time (US/Cent Open Date *			Restrict Buyer Notifications	Yes			
Open Date * Close Date * Close			✓ Dates				
Close Date *			Time Zone	CDT/CST - Central Standard Time (US/Cent 🗸			
Close Date *			Open Date *				
★ Required Save Progress Next >			Close Date *				
			★ Required	Sa	we Progress	Nex	xt >

Settings and Content





Settings and Content

- Additional Commodity Vendors Codes Review and Submit Forced Vendor Invitation by Yes Commodity Code Tools > Display and Communication Visible to Public Yes Public Event Short Description 200 characters remaining Restrict Buyer Notifications Yes ➤ Dates Time Zone CDT/CST - Central Standard Time (US/Cent 🗸 Open Date * mm/dd/yyyy hh:mm a Close Date * ★ Required
- Title of the RFP. (Optional) The Buyer may change the 2.

1.

(Optional) The Buyer may change the

Type:

- RFP number by clicking the pencil icon. (IMPACS auto-generates a number by default).
- By clicking on the **Edit** button next to 3. the Reporting Commodity Code and Additional Commodity Codes, the Buyer may select the appropriate Commodity Codes for the RFP.



If the Buyer does not know the Commodity Code, then use the search box at the top of the Commodity Codes Menu that pops up when the Commodity Code **Edit** button is selected. There is also a PDF listing of all the Commodity Codes. You can find it here under **IMPACS Resources**: <u>https://das.iowa.gov/iowamanagement-procurement-andcontracts-system-impacs</u>

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Commodity Codes

Laptop		×
< > Page	1 of 472 1-20 of 9422 Results	20 Per Page 🔻
Commodity Code	Description	
1000	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	Select
10000	BARRELS, DRUMS, KEGS, AND CONTAINERS	Select
10004	Baskets, All Types (Not Otherwise Classified)	Select
10005	Boxes, Crates, Baskets (Inactive, effective January 1, 2016)	Select
10006	Containers, Plastic, All Purpose)	Select
10007	Containers, Recycling	Select
10008	Covers, Drum, All Types and Sizes	Select
10009	Casks, All Types	Select
10010	Drum Spigots, Metal or Plastic	Select
10011	Crates, Plywood	Select
10015	Drums, Miscellaneous	Select
10020	Flip-top Cap Closures	Select
10021	Freight and Cargo Containers, Shipping, (See Class 640 For Boxes)	Select
10025	Gaskets, All Types: Barrels, Drums, Kegs, and Pails	Select
10030	Hazardous Material Containment and Storage,	Select



These are the Commodity Codes that appear when "Laptop" is entered in the search box.

Select the Commodity Code that best fits your RFP.

If additional Commodity Codes are needed for the RFP, then repeat the process for the **Additional Commodity Code** field on the **Setup page**.

The Vendor (Respondent) will be notified via email of this solicitation if they registered in IMPACS with the commodity code(s) selected for the RFP.

Commodity Codes

Laptop		
Q Commodity Code	Description	
20454	*Microcomputers, Laptop, Notebook and Tablets	Select
20554	*Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products	Select
5567	Mounting Hardware: Laptops, GPS, Cameras, Electronic Devices, etc. Automotive.	Select
98424	Computers, Microcomputer, Handheld, Laptop and Notebook, Rental or Lease	Select



Commodity Codes

Include a brief description of the Goods and/or Services you seek in the **Public Event Short Description** Section. You can expand the box by dragging the lower right-hand corner of the box.

RFP Test 003 S 401-RFP-HHS-0012-2024	Setup	Event Actions 🔻 History 🗎 ?
Proposal	Event Title *	RFP Test 003
Event Status: Draft E	Event Type 😧	DHHS - Request for Proposal
Settings and Content 👻 D	Department	Health & Human Services - DHHS
Setup 🛕 E	Event Number *	401-RFP-HHS-0012-2024 🖌
Users 🗸	Commodity Codes	
Jescription 🗸	Reporting Commodity Code	- Edit
Vendors A	Additional Commodity Codes	- Edit
	Forced Vendor Invitation by	Yes
Tools »	Commodity Code	
~	 Display and Communi 	cation
V	/isible to Public	Yes
	Public Event Short Description	200 characters remaining
R	Restrict Buyer Notifications	
~	Dates	
Т	lime Zone	CDT/CST - Central Standard Time (US/Cent 🖌
0	Open Date *	mm/dd/yyyy hh:mm a
	Placa Data *	

Display & Communication



Release Date (Future): Please ensure it is at least **48 hours** before the Open Date and time.

The current method is to post the RFP on Bid Opportunities 48 hours before the Open Date and time. By doing this, the solicitation is posted on the TSB website before opening to the public.

Open Date: Select the date and time the RFP will be open to the public. Type in the date directly in the box or use the pop-up calendar by selecting the calendar icon. The clock icon will set the time.

Continue filling out the Close Date.

Save Progress to save and stay on the page, or Next to save and move to the next Section.











Event Creator - The field is automatically populated with the event creator.

Event Owners - You may add additional event owners here (see next page for search options). Depending on how your Department is set up, your department may have full control over this RFP as a default.

Contacts – additional contacts may be added here. The field is automatically populated with the event creator.

Stakeholders are Users interested in the solicitation but can only view it, not edit or respond to questions. This is a good place to list the requestor or evaluators.

Notification Recipients will receive IMPACS notifications, for instance, if a Vendor has submitted a question or if the RFP has been extended. The field is automatically populated with the event creator.

Most of the time, you will not need to change anything on this page.

Generic RFP Test 005-RFP-0311-2023	Users	Event Actions 👻 History 🗎
Type: Request for Propose Event Status: Draft	Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. Whe created and executed but not all users will receive notifications and e-mails.	en the limit is exceeded, solicitations can still be
Settings and Content 🖤	Event Creator * Shannon, Laura	
Setup	Event Owners * Event Owners have full control over this event:	
	Shannon, Laura	
Description Prerequisites	Event Managers on this Department have full control over this event:	
Buyer Attachments	Role: Admin (2 users)	
buyer Attachments	Role: Procurement (0 users)	
Vendor Attachments	 Department: Department of Administrative Services (005) (13 users) 	
Questions	Contacts * Contact information for these users is shown to vendors:	
Additional Item Fields	Shannon, Laura	
Price Components	Stakeholders Stakeholders can view the event and responses:	
Items	No User Selectea	
Vendors		
Review and Submit	Notification Recipients * Only Notification Recipients will be eligible to receive system-generated event notifications.	
ools »	Shannon, Laura	
	★ Required	C Previous Save Progress Next >

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A **User Search** pop-up window will appear once the Edit Users button is selected (from the previous page). Search for the User in the **Search Box** and then click Select once the Buyer has been found.

Save Changes once the User(s) have been selected.

User Search	×
C More Op	otions
Page 1 of 91 1-10 of 906 Results	10 Per Page 🔻
Name	
Brennan, Kelli A	Select
Buyer, Betty	Select
Test, Buyer	Select
Removed_7970691 (inactive)	Select
Jacobus, Todd	Select
Fitzgerald, Michael	Select
Woolery, Dale	Select
Pate, Paul	Select
Strawn, Matthew	Select
Bayens, Stephan	Select
Page 1 of 91 1-10 of 906 Results	10 Per Page 🔻
elected Values No Values Selected	
Save Ch	anges Close



Event Users Search





The **Description** Field is filled out with information about the RFP. Your template may have specific language pre-populated.

Pull down the slide icon to expand the field.

The Buyer may add to the existing language.

The formatting controls are similar to Microsoft Word.

Save Progress or Next.

RFP Test 003 401-RFP-HHS-0012-2024	Description	Event Actions 🕶 History 🗎 ?
Type: DHHS - Request for Proposal Event Status: Draft	Please enter a description for this event, or copy from library. *	Copy from Library
Settings and Content 💟	Format Image: Constraint of the state	
Setup 🛕		
Users 🗸	Do not upload proposals or questions to this system. Follow the submission instructions in the attached document to ask que	stions and/or to submit a
Description 🗸	proposal directly to the Department of Health and Human Services. Do NOT submit proposals electronically to this system.	
Buyer Attachments 0		
Vendors O		
Review and Submit		
Tools 🕨		
	★ Required	Save Progress Next >





Buyer Attachments

Location for Purchasing Agent/Issuing Officer Attachments to the Respondents. Attach RFP Document here



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Buyer Attachments Section - This i	s where	the Buyer	Buyer Attachments					Event Acti	ions 🔻 History ?
will upload the RFP document.			Add Attachment Attachment		Version 4	Size 🛆	Added By 🗠	Modified Date	
Click on the Add Attachment button Document and any other relevant for the Add New Attachment button to attachments or links. Make the RFP in the list by changing the Display (Clicking the Actions button will allo Download or Delete the Attachmer	iles or li o upload docum Drder .	nks. Click d more ent FIRST	LIMPACS Generic RFP Templat	e.update 120823.docx	1	70 KB	Laura Shannon	1/3/2024 1:54:57 PM Previous Save Progre	Actions -
Buyer Attachments				History ?		Add Attachr	ment		× Cio
Add New Attachment						Attachment Type *	● File ○ Link		
1-8 of 8 Results				10 Per Page 🔻	- 11	File *	Select files Drop	files to attach, or browse.	1.0
Attachment	Size 🛆	Added By	Modified Date				Maximum upload file aiz	200.0 MR	1
RFP - Exceptions Form.docx	20 KB	Laura Shannon	1/10/2023 9:34:02 AM	Actions 🔻	_	Comments			
Let Terms and Conditions for Federal Compliance.pdf	165 KB	Laura Shannon	11/21/2022 9:53:00 AM	Actions 🔻			1000 sharedan arresision	ĥ	
L GOODS Terms and Conditions 05.1.16.pdf	223 KB	Laura Shannon	1/10/2023 11:11:16 AM	Edit Properties		Display Order *	Last		
▲ Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	130 KB	Laura Shannon	1/10/2023 11:11:16 AM	Download Delete		* Required	<u></u>	Sav	e Changes Close

Buyer Attachments

Vendors Section

Vendors Invited by Commodity Code

Add Vendors to the Event



If there are Vendors that have registered under the Commodity Codes that were entered earlier in the Setup Section, then you will see the number of Vendors that will be notified when the RFP opens.

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Vendors Invited by Commodity Code

The Buyer may add Vendors to be notified manually.

Under the **Add Vendors to Event** Tab, a Search Window opens, allowing the Buyer to search for Vendors registered in the IMPACS system.

Enter the information and click **Search**.

If the Vendor is registered, then the results will show the Vendor's name and contact information.

(Optional) add a contact by clicking the Add Contact button.

Click **Add to Event** to add the Vendor. They will receive an email notification of the RFP.

/endors					Event Actions 👻 History
Vendors Invited by Com	modity Code (2) Add	ditional Vendors	s (0) Add Ven	dors to Event Add Vendors From	Group
					Manually Invite Vendors 🖜
earch Registered V	endors				Show Advanced Search
'endor					
elationship	All	~			
endor Contact					
p Code		Within 5 Mil	es 🗸		
ommodity Code	-		Edit		
AICS Code	Type to filter		Q		
					Clear Q Search
				[Previous Save Progress Next >
endors					Event Actions 👻 History
Vendors Invited by Com	modity Code (0) Add	ditional Vendor:	s (0) Add Ven	dors to Event Add Vendors From	Group
					Saved Searches Manually Invite Vendors
Modify Search					
endor Name		Doing Busin	ess As	Sales and Corporate Contacts	Action
BAKER MECHANICAL	. INC			Daryld Karloff (Sales) karloffd@thebakergroup.com	Add to Event
				Add Contact	

Add Vendors to Event by Searching

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The Buyer may also fill out a pop-up window or a template with the names of the unregistered Vendors they would like to add to the RFP.

Click on the Manually Invite Vendors Dropdown box.

Select Add Vendor to Event

ement of Procurement and Contracts System

Repeat as necessary by clicking Save and Add Another or Save to move on.

If you have many unregistered vendors to add, then you may download the template, fill it out, and import it back to IMPACS.

Click the Manually Invite Vendors button and Get Import Template.

Vendors			Event Actions 👻 History ?
Vendors Invited by C	commodity Code (0) Additional Vendors	(0) Add Vendors to Event Add Vendors From Group	
			Manually Invite Vendors 👻
Search Registered	l Vendors		Import Get Import Template
Vendor			
Relationship	All 🗸		Add Vendor to Event
Vendor Contact			
Zip Code	Within 5 Mile	es 🗸	
Commodity Code	-	Edit	
NAICS Code	Type to filter	٩	
		_	Clear Q Search
- F			
1001	Add Vendor t	o Event	×
and the second	/ du rondor t		
	Vendor Name *		1.0
1000			Sec.
	Sales or Corporate Contac	t	1.0.1
-	Name		
	Email *		
			_
	* Required	Save Save and Add Another Clos	-

Add Vendors to Event – Manually Invite

Once the Template is downloaded, the Buyer will see an **Instructions Page** and the **Import Data Page**.

Fill out the **Import Data Page** with the Vendor information.

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Introduction

Sourcing Events offer the ability to manually invite suppliers via the application or via import. The purpose of this page is to provide detailed instructions for how to import manually invited suppliers. This page will help you: - Understand the format for importing manually invited suppliers - Perform an import of manually invited suppliers

Key Features of Manually Invited Suppliers Import

- Manually Invited Suppliers Import allows you to import manually invited suppliers in "bulk".

- The project must be set to allow manually invited suppliers in order to perform the import.

- The import supports manually inviting suppliers which are not in the system. This process will not add contacts to an existing supplier.

Manually Invited Supplier Import Fields

Some key information regarding the import format:

- Not all fields in the template are required.

- It is recommended that you always download the current template file from your site prior to populating data. This ensures that

you always have the most up-to-date import requirements.

The following table details the template on the "Import Data" tab of this spreadsheet and provides information regarding the fields available to import and the format required for import. Please note the following about the table below:

- Required fields are marked in with an asterisk (*) in the Header Field Name column.

- Field formatting requirements are detailed in the Description column. (If there is no specific format requirement information, then you may enter any alpha-numeric value).

		Header Field Name		Description
•		Supplier Name*		This is the name of the supplier being invited.
ady	Ins	structions Import Data	+	This is the name of the sales or

When the spreadsheet is ready, navigate back to the Vendors main page and select Manually Invite Vendors - Import Vendors.

For Import Action, Select Validate.

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This action will validate the email address and make sure that it is a valid email address.

Supported file types are: .x	lsx and .xls
Import Action	Validate 🗸
File Name *	Choose File No file chosen The maximum file size for importing is 5 n
Description	
Email Me When My Import Is Ready	○ Yes ● No What's this?

It might take a few minutes for IMPACS to validate the spreadsheet. You may track the progress of the validation process under the **Tools Menu** – **Exports and Imports** on the left side of the screen.

Refresh the page often.

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Download the validated file and save it to your computer.

RFB 17 Test 002 005-RFB-0240-2023	Exports a								Event Actions 👻 H	listory
Type: Request for Bids	Exports	and Imports will be de	leted 7 day(s) a	after creation.						
	Looking for th	is Event exported as a F	PDF? Go to View	w Exports					Refresh	h this I
Settings and Content 🔉									Delete	e Selec
Vendor Responses 🔉	Туре 🛆	Collateral 🗠	Description	on 🗠 🔤	Requested By	Requested At 👻		Status 🗠	File 🗠	
Tools 🖤	Validate	Vendors			Laura Shannon	12/19/2022 1:18 PM	n	Pending		
Internal Notes										
Q & A Board										
Approvals										
Award Notifications										
		is 🗸 🔪								
RFB 17 Test 002		and Imports							Event Actions 👻 H	listor
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When the Buyer is ready to import the validated file, navigate back to the **Vendors** main page and select **Manually Invite Vendors - Import Vendors.**

For Import Action, Select Import.

The Buyer may track the progress of the Validation Process under the **Tools Menu – Exports and Imports** on the left side of the screen.

Refresh the page often.

Or, you may select **Email Me When My Import Is Ready**, and the Buyer will receive an email when the file is ready.

Click Submit.

Iowa Management of Procurement and Contracts System

Import Vendor	'S
Supported file types are: .x	lsx and .xls
Import Action	Import V
File Name *	Choose File No file chosen The maximum file size for importing is 5 mb
Description	
Email Me When My Import Is Ready	Ves No What's this?
* Required	Submit

The number of additional Vendors – manually invited - will be indicated in parenthesis in the **Additional Vendors** tab.

The Vendor information will be listed under the tab. The Buyer may remove a Vendor here.

Save Progress or Next.

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Iowa Management of Procurement and Contracts System

/endors			Event Actions 🔻 History
Vendors Invited by Commodity	Code (0) Additional Vendors (1)	Add Vendors to Event Add Vendors From Group	
Event Vendors			
/endor Name	Doing Business As	Sales and Corporate Contacts	Action
OIJAGGAERTEST		Laura Shannon (Sales) SOIJAGGAERTEST@gmail.com	Remove
		Add Contact	
		Previous	Save Progress Next >

Add Vendors to Event



Errors and Approval



The last step is to **Review and Submit**.

If there are errors, an error message will appear and indicate the error to be corrected. The error language is a link that will take you back to the item in question.

After the error is corrected, be sure to **Save Progress** on that page.

Once all errors have been addressed, click **Submit for Approval.** The Solicitation should automatically be approved based on DHHS approval workflow settings.

	500 users per Role, Department or Business Unit for notification ot all users will receive notifications and e-mails.	
A Please complete all required	d sections to submit this event.	
Section	Progress	Action Needed on the Following
Setup		▲ Q&A Submission Close Date ▲ Open Date ▲ Close Date
Users	 Required Fields Complete 	
Description	 Required Fields Complete 	
Prerequisites	3 No Required Data	
Buyer Attachments	8 No Required Data	
Vendor Attachments	 No Required Data 	
Questions	(39) No Required Data	
Items	0 No Required Data	
Vendors	2 Required Data Provided	
	500 users per Role, Department or Business Unit for notifications	C Previous Submit for Appro Event Actions → Histor s and e-mails. When the limit is exceeded, solicitations can still be
Review and Submit Solicitations have a limit of 5 created and executed but no	500 users per Role, Department or Business Unit for notifications it all users will receive notifications and e-mails.	
Review and Submit Solicitations have a limit of 5 created and executed but no All sections are complete. You	t all users will receive notifications and e-mails.	Event Actions 👻 Histor
Review and Submit Solicitations have a limit of 5 created and executed but no	t all users will receive notifications and e-mails.	Event Actions 👻 Histor
Review and Submit Solicitations have a limit of 5 created and executed but no All sections are complete. Yo Section Setup	t all users will receive notifications and e-mails. ou may submit your event for approval. Progress	Event Actions 👻 Histor s and e-mails. When the limit is exceeded, solicitations can still be
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Review and Submit Cereated and executed but no All sections are complete. Yo Section Setup Users Description Prerequisites	t all users will receive notifications and e-mails. Du may submit your event for approval. Progress Required Fields Com Req Required Fields Com Requir	Event Actions
Review and Submit • Solicitations have a limit of 5 created and executed but no • All sections are complete. Your Section Section Section Description Prerequisities Buyer Attachments Vendor Attachments	t all users will receive notifications and e-mails.	Event Actions
Review and Submit • Solicitations have a limit of 5 created and executed but no • All sections are complete. Your Section • All sections are complete. Your Section Section Section Description Prerequisites Buyer Attachments Vendor Attachments Questions	t all users will receive notifications and e-mails.	Event Actions
Review and Submit Solicitations have a limit of 5 created and executed but not created and executed but not of the second seco	t all users will receive notifications and e-mails. ou may submit your event for approval. Progress Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Data Required Data Required Data No Required Data No Required Data No Required Data No Required Data	Event Actions
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Review and Submit Solicitations have a limit of 5 created and executed but not created and executed but not set of the set	t all users will receive notifications and e-mails. ou may submit your event for approval. Progress Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Fields Com Required Data Required Data Required Data No Required Data No Required Data No Required Data No Required Data	Event Actions

Review and Submit



To check the Approval Status, click the **Return to My Event** hyperlink.

Next Steps What would you like t • <u>Return to My E</u> • <u>Add Another E</u> • <u>Go to My Hom</u> • <u>Go to Sourcing</u>	Event ne Page		
View Approval S Event Summary	Steps		
Event Title	RFP Test 003	Time Zone	CDT/CST - Central Standard Time (US/Centra
Event Type 😧	DHHS - Request for Proposal	Open Date	5/1/2024 8:00:00 AM
Department	Health & Human Services - DHHS	Close Date	6/1/2024 2:00:00 PM
Event Number	401-RFP-HHS-0012-2024		





To check the approval, Navigate to **Tools>Approvals** to see if the approval workflow has been completed.

Before the solicitations is **Released**, you may click the **Workflow Actions** button in the upper right corner to return the Solicitation to draft status to make edits. You may also cancel the Solicitation altogether.

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RFP Test 003 401-RFP-HHS-0012-2024	Approvals Evert Ac Return to Draft	_
Type: DHHS - Request for Proposal Event Status: Approved	Solicitation Approval Workflow Solicitation Evaluation Workflow	
Settings and Content 🔉	Show skipped steps	
Tools 🖤	Orientation Horizontal	
Internal Notes		
Exports and Imports	Submitted Completed	
Q & A Board	1/5/2024 2:56 PM 1/5/2024 2:56 PM	
Approvals		

Approvals and Workflow Actions

Workflow and Event Actions

Amend, Extend, Cancel



After the Solicitation is **Released**, the following options are available:

The Workflow Actions dropdown in the upper right corner has the following options: Amend the Solicitation, Close the Solicitation Early, and Withdraw the Solicitation

The Event Actions dropdown in the upper right corner has the following options: Copy the Solicitation, Export the Solicitation as a PDF, and Extend the Solicitation

	Workflow Actions Amend Close Early
	Withdraw Event
	t Actions V History P ?
rele	

Follow the instructions that pop up after selecting an action. If you amend the solicitation, you must go through the approval process again.



Workflow and Event Actions

Questions? Please contact <u>laura.Shannon@iowa.gov</u> Or call 515-330-7325



